USER GUIDE

PARTNER ADMIN

Contents

Get started with In4mo

The insurance companies you will work with create an account for you as the Company Admin of your company and you will get a **username and a password** from them.

Admin role means that you have the highest authority level (4) and you can edit and add members and offices in your company.

When you have logged in to the correct portal you will see a tab called Company Admin on top of the first page.
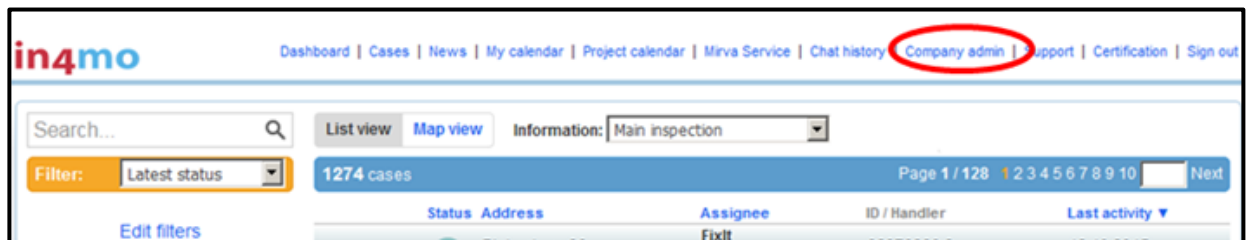

If you click on the Company Admin tab you will get to the company profile page.

The insurance company in question has created your company as their partner. Here you can edit the company profile and fill in information on the company level.

Note!
If you are a subcontractor for some other company using in4mo, you need to activate the Become subcontractor -box by clicking on it.
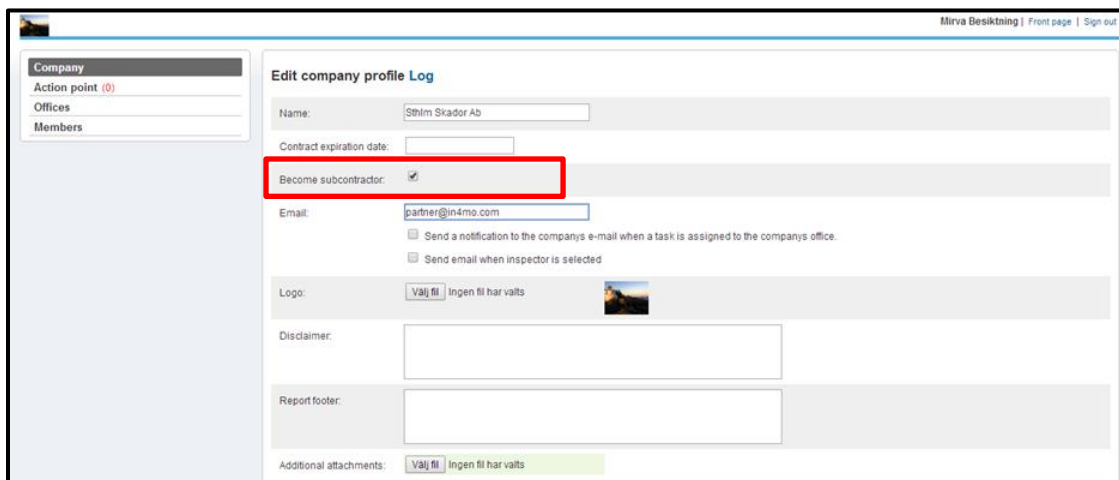

Remember to press Save changes at the end of the page when you are ready.

Editing and adding Office information

Press Offices in the menu on the left side to add and edit offices in your company. Click on the cogwheel on the right side to edit information for a specific office.

To add a new office, click on +Add New Office in the right corner of the page. Fill in the needed information regarding the new office. Choose carefully the general services and expertise this office offers for the insurance company in question.
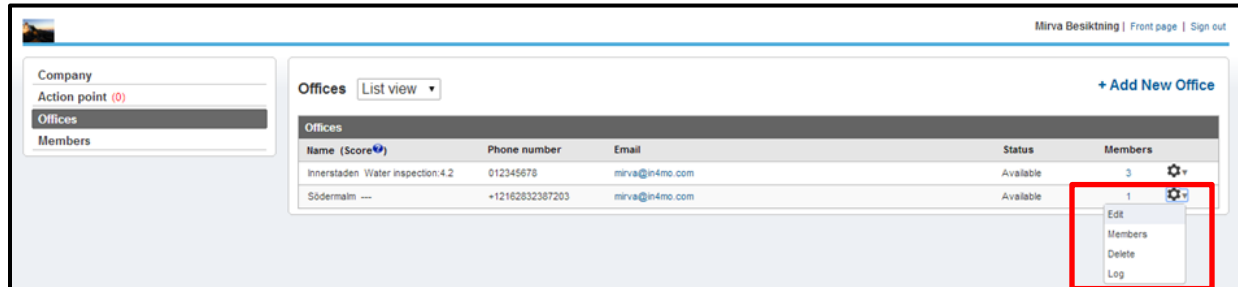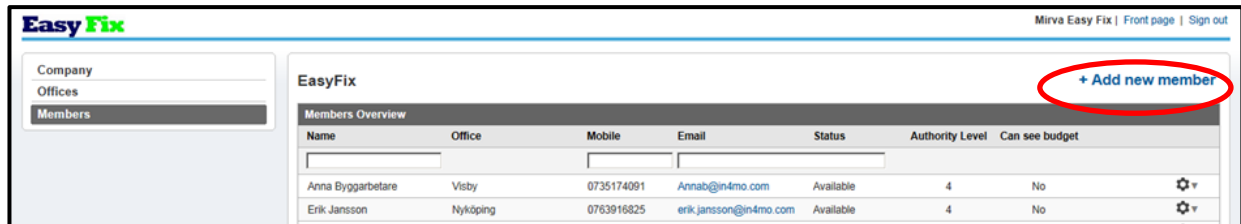
There is a possibility to mark the office as available or unavailable which means that the office either can be chosen for a task or not. If you choose Unavailable for new tasks the office in question will not get new cases, but are available for old cases where they already have a role.

When you are ready scroll to the end of the page and press Add.

NOTE: These settings need to be done in all the insurance company portals your company uses and for all the offices separately.

Add and edit members

To add and modify members press Members on the left side menu. Click on the cogwheel on the right side when you want to edit member information. To add a new member, click on + Add new member.
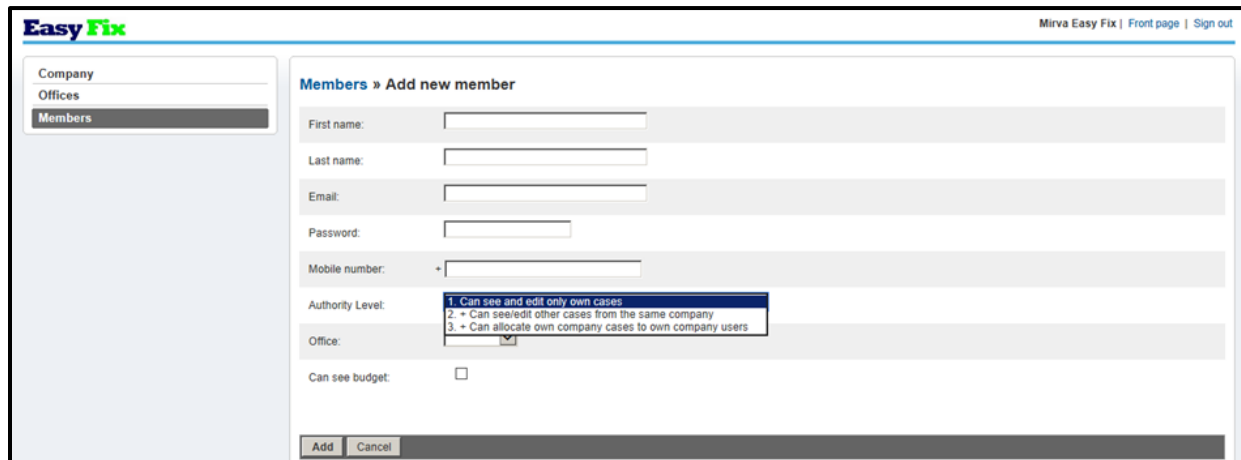
Fill in the contact information for the new member.

Choose the authority level which will determine which information is visible to this person.

If your company has several offices, you will need to pick the applicable office.

Tick the box Can see budget if this person needs to be able to upload budgets.

Press Add when you are ready.

How to register members to in4mo training courses and remote assessments
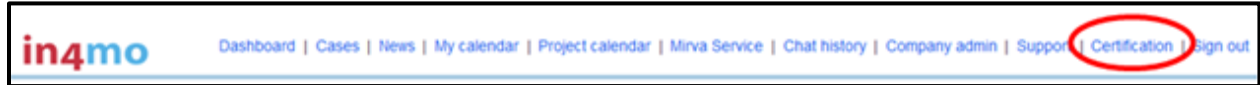
All the members in your company must be certified for the different types of tasks to use the in4mo tool in insurance cases. Certification is not needed for contractor cases.

Log in to the in4mo portal of an insurance company and press Certification at the top of the page. There you will find certifications and other courses (e.g. iCC)

There are 2 different kinds of certificates:

1. For inspectors and project managers (incl. craftsman certificate)
   Certified members can carry out inspection, craftsman and project manager tasks in in4mo.

2. For craftsmen
   Certified members can carry out craftsman tasks in in4mo.

Admin users on your company who do not carry out tasks on the damage sites, but allocate and coordinate tasks, do not need to be certified.

Choose the course you want to register users for and make sure to read the information that is provided in the description and notes fields.

NOTE! When registering to a remote certification you are expected to learn how to successfully use the in4mo solution on your own. No assistance will be given to complete the assignments; **it is an <u>evaluation</u> and not a course**.

Press Sign up for this course when you are sure that you have the correct training or remote assessment for your needs.
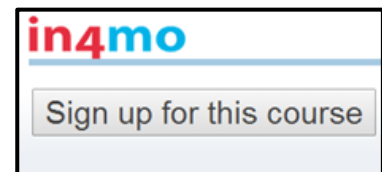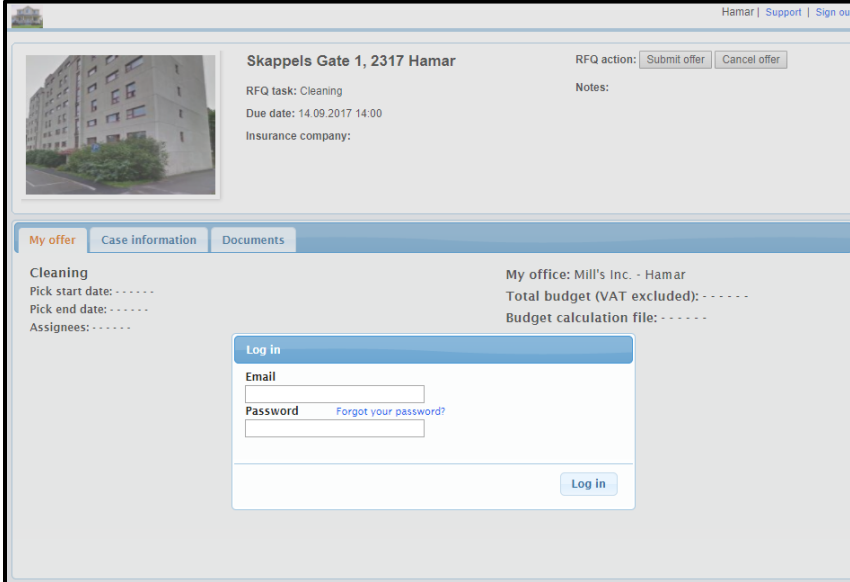

IMPORTANT!
The registered **participants will get two e-mails** with information about how to prepare for the course or remote assessment. Make sure that your colleagues have done the needed preparations before the assessment day arrives.

The bidding feature (RFQ)

In in4mo it is possible to send a Request for Quotation (RFQ) for any task, except for inspection tasks and project management.

Once an insurance company decides to ask your company for an offer regarding one or more tasks, **you will receive the request through e-mail**.

The e-mail contains a link to a page where you can submit your offer and review case related information. Log in with same details as you have in the portal.
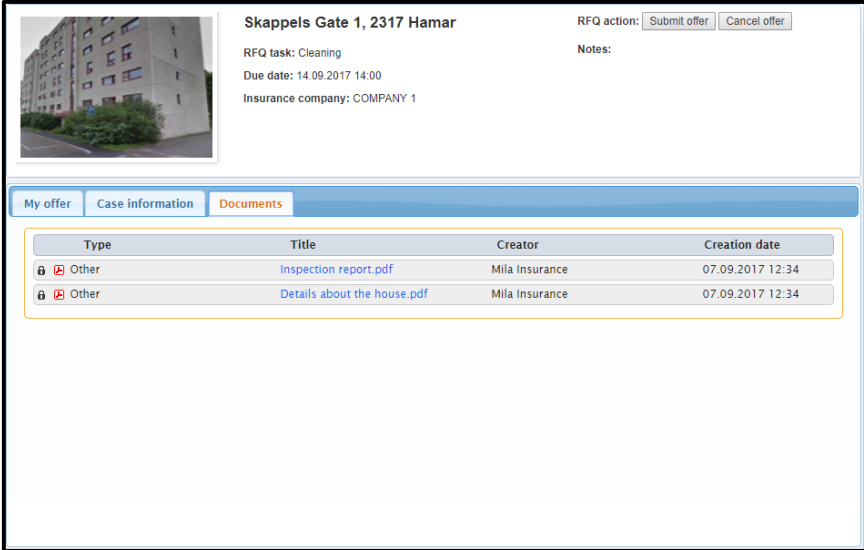
Look through the available documents by clicking the Documents tab and make a cost calculation.

When you have made the cost calculation and established the budget, press Submit offer.
Insert the task budget and attach the cost calculation.

You know that your offer has been sent, when you see the information you inserted on the front
page.

If your offer is chosen once the due date has come, **you will receive the information to your
office e-mail** and your budget and cost calculation will be automatically attached to the task(s)
in question.

Add and send invoice for approval

When you wish to add invoice to task(s) go to Invoice tab and press Add on the right side.
Fill out the needed information and press Add.

Only those users in your company, who have the permission to see the budget, can see and attach
invoices for your company offices. Make sure that **'Can see budget'** is activated for those users
who need to see budgets and add invoices. This is done in member settings.

Invoices will be saved both under the Invoice tab and in the Documents library. An invoice icon
will also be visible on the case list.

The invoices will come for approval to the case handler, who can accept or reject the invoice. Once
an invoice is approved, it can still be rejected afterwards.

It is also possible for insurance company users to attach invoices on the behalf of your company.
In that case you will still be able to see the invoices regarding your company's tasks.